User Account Request

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Overview

The State of Vermont used various means for processing user account requests. This process was a collection of several manual and electronic forms for newly hired employees, changes to existing employee information, or removing terminated employees. These collections of systems are replaced by the LANDesk request system that will automate the account request process.

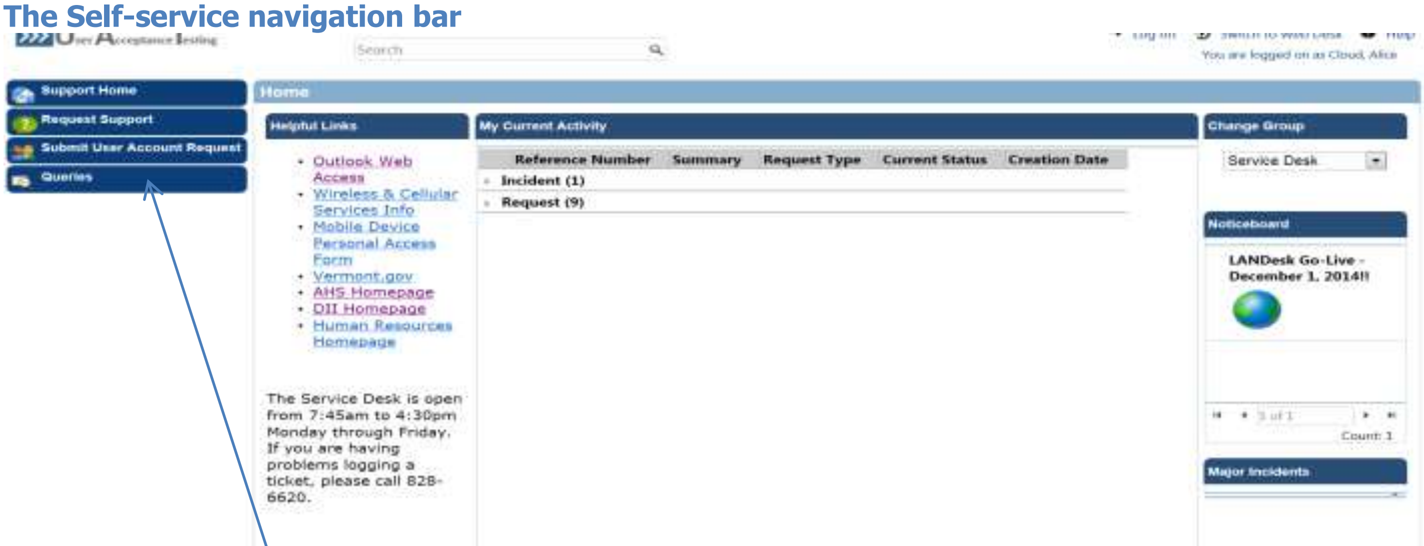
Authorized requestors will be logging into LANDesk and making the requests for computer accounts. These individuals are those who are in charge of requesting personnel actions for new, current, or terminated employees. They will have the ability to request to add, edit, and remove the access of employees to various state systems and software. **Authorized requestors are tasked to make sure that a request is appropriately approved before they put in a UAR ticket.** (A department's internal business process/policy around access to data may dictate who should have permissions/access.)

Authorized approvers will be logging into LANDesk as well to review requests for approval or denial.

Log into LANDesk

- Go to https://itsupport.vermont.gov if your domain is VSMS, TAX or AHS. Your windows login credentials will pass through to LANDesk, and should log you in automatically.
- Go to https://itsupport.vermont.gov/logon if your domain is different from above (example LABOR, DPS). You will need to use this explicit login. You use your email address as your user name with no password to open LANDesk.
    - ❖ **NOTE:** Since this is a secure website, to access LANDesk Self Service from a remote location, connect via VPN or Citrix first.

The Self-service navigation bar



Navigation on the left of Self Service provides access to the different areas of Self Service that the requestor has the right to use. When clicking on a link at the left, the navigation bar becomes narrow, displaying only the group icons, to provide more space for the next window that opens that will need data input.

Helpful Links area above will quickly bring you to websites that can provide information

My Current Activity shows your submitted tickets. They are grouped by Incidents and Requests.

Incident = report when something doesn't work or is broken

Request = report your user account requests, IT technology needs or requests of service

Clicking on the ▶ beside the activity expands the area and shows the tickets you have submitted and their status.

Noticeboard and Major Incidents are on the right of Self Service. The Noticeboard will include upcoming maintenance and planned events. The Major Incidents are when services could be having issues and impact many users (such as connectivity problems, Vault issues etc..).

Dashboard Status

Acknowledged – This is a pass thru status which most requestors will not even see when submitting a completed ticket. If the requestor chooses to Save & Close at the employee information screen instead of "Save" the request becomes acknowledged until they re-open the ticket to finish and submit.

Awaiting User Completion – the request form has been started but is not yet complete until an account request has been entered and submitted. (Nothing gets forwarded until "submit" is clicked by the requestor)

Open – The "child" request has been created, and is waiting for an analyst to be assigned.

Awaiting Authorization – the request requires prior approval and is waiting for an approving authority to approve.

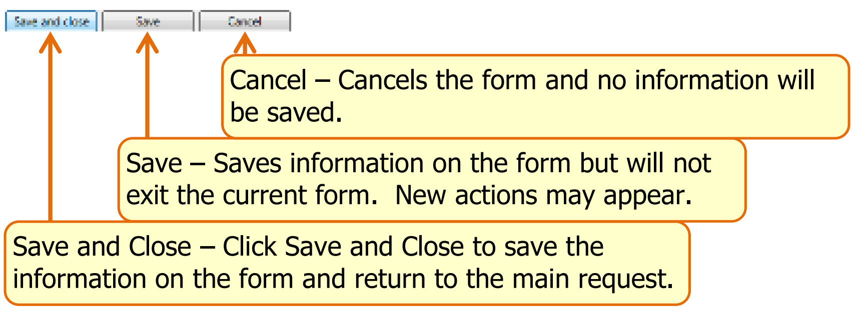
In Progress – the request has been submitted and waiting for accounts to be created.

Out with Customer – the analyst has asked for more information; the request is waiting for a response or action from the requestor.

Awaiting Child Request – the "parent" will have this status until all the "child" requests have been completed and closed.

When to choose "Save and close", "Save", or "Cancel" - **NONE of these options will submit the request.**

When finished with any form, the requestor will have the following options.



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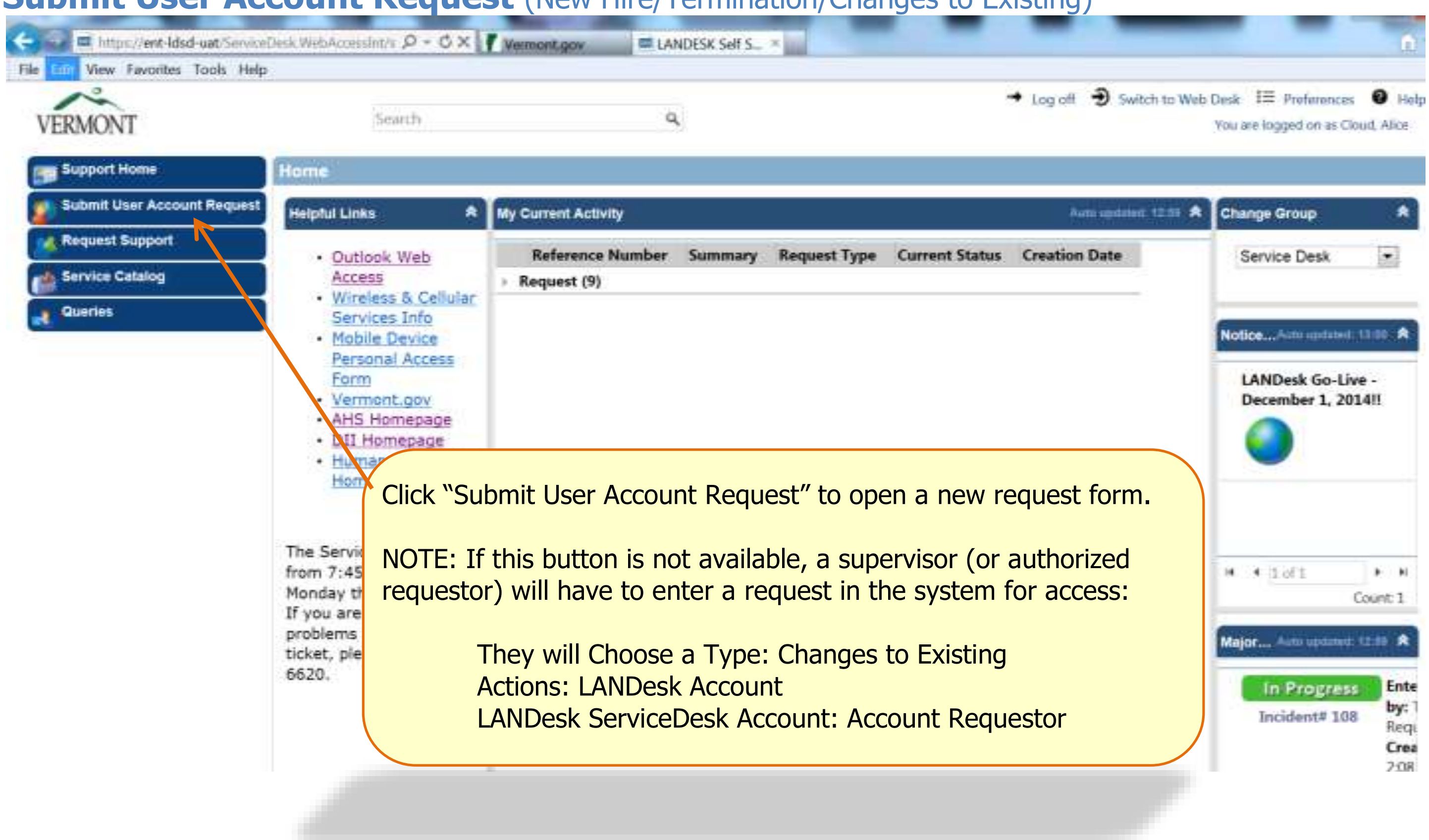
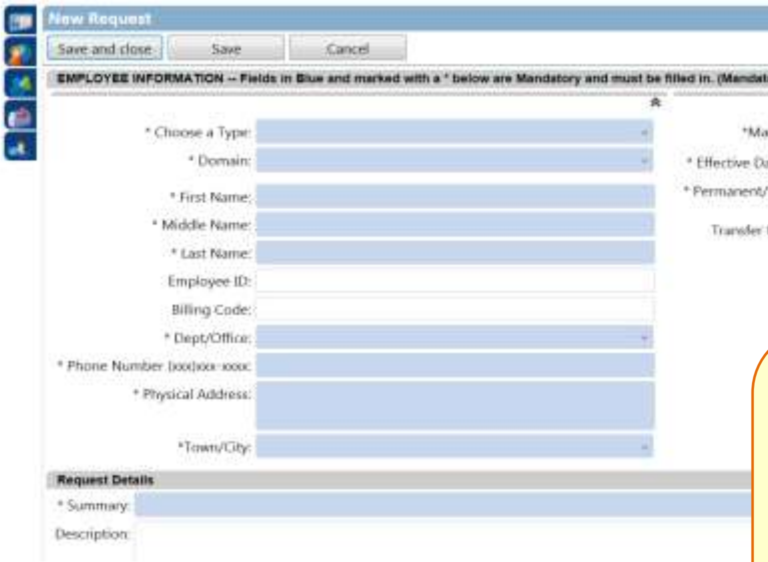
Submit User Account Request (New Hire/Termination/Changes to Existing)





Fields that are blue are mandatory; however, please enter as much information as possible. This information must be filled out on all account requests, regardless of the type of account. Mandatory fields may change depending on account request type chosen.

List boxes – click on a list box to display its contents. If the list contains more than 50 entries, a page control appears at the bottom of the list to enabling movement between the different pages of values.

Click next to an entry to expand further options to choose from. (See Below)

Choosing a Type

Changes to Existing - (For a User/Employee/Vendor/Contractor/Partner who is in <u>same position</u>)

- Current user requires change in access/permission to an existing folder or account (i.e. for example: need to be added to an existing Active Directory folder or removed from a security group and/or email distribution list*) *Distribution Lists tend to have owners associated so you may not need to do a UAR but instead contact the owner of the list with your needs. See http://dii.vermont.gov/support/how_to Managing Distribution Lists.
- Current user requires change to add/remove a program account ***due to changes in duties.*** (i.e. add OnBase, AFG, Peaks application if user did not have it previously OR remove ACD phone, OnBase, OMS).
- <u>Name Change</u> to a current user. Identify user's current existing name, then in description box, detail what the new name should be changed to. This will require account actions be picked to identify what account's the user has that will need the name change.

New Hire

- A new user who currently does not have an account with the State of Vermont (new employee to State Government)
- A new vendor/partner/contractor account who currently does not have a State of Vermont account
- A <u>Current user</u> moving within State Government (i.e. being hired into a different position by terminating from previous position or changing from a Temp/Vendor to a permanent state employee)
  – A LANDesk UAR Request is done by Hiring Agency/Department who submits a UAR request to add new security groups and/or accounts specific to the new position

Termination

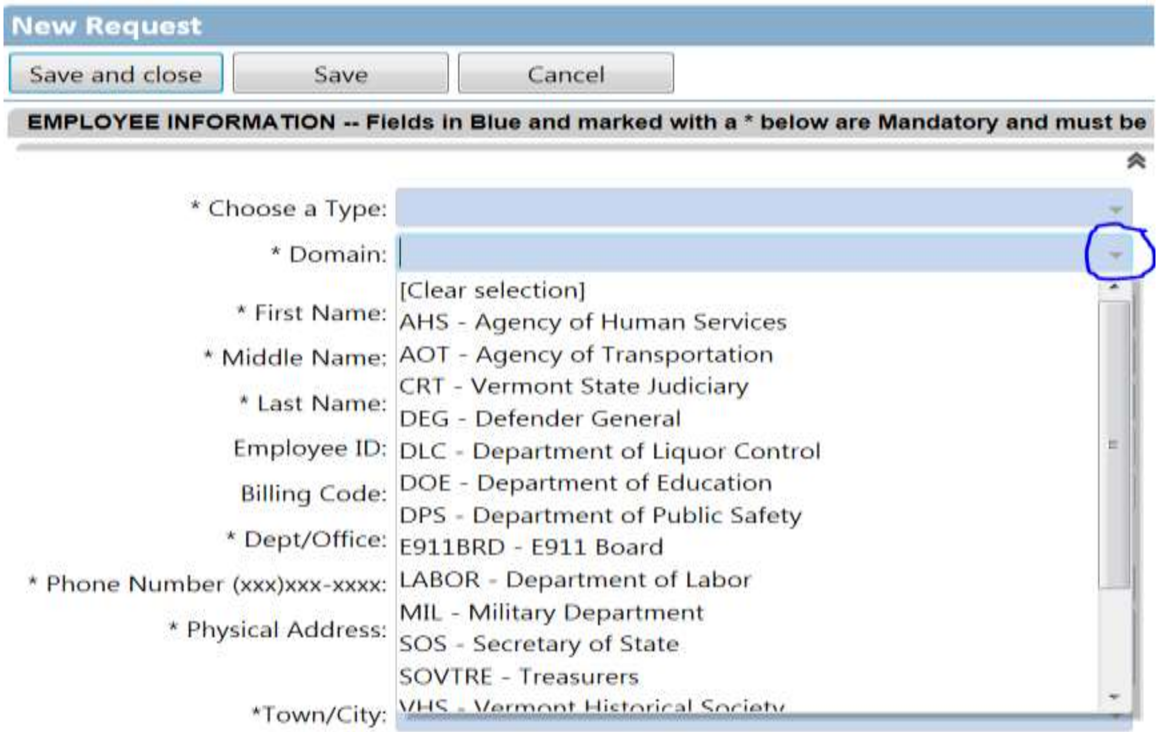
- A user who has terminated from their State of Vermont employment
- A vendor/partner/contractor account who no longer needs their State of Vermont account
- A <u>Current user</u> moving within State Government (i.e. terminating from a position and being hired into a different position or changing from a Temp/Vendor to a permanent state employee)
  – A LANDesk UAR Request / Termination is done by the Departing Agency/Department to remove all current security groups and other account accesses that are no longer needed. This is also where it would be noted in the description details that authorization is given for the user to have access to existing mailbox and files.

Use "REQUEST SUPPORT" Module in LANDesk for the following cases:

- You need an Active Directory group or folder created/removed and list existing users that should have permissions given/removed.
- You need to have an Email distribution list created/removed and list the user to add/remove to that list.
- Simple Global Address List changes in Outlook such as, phone number change, location address changes.

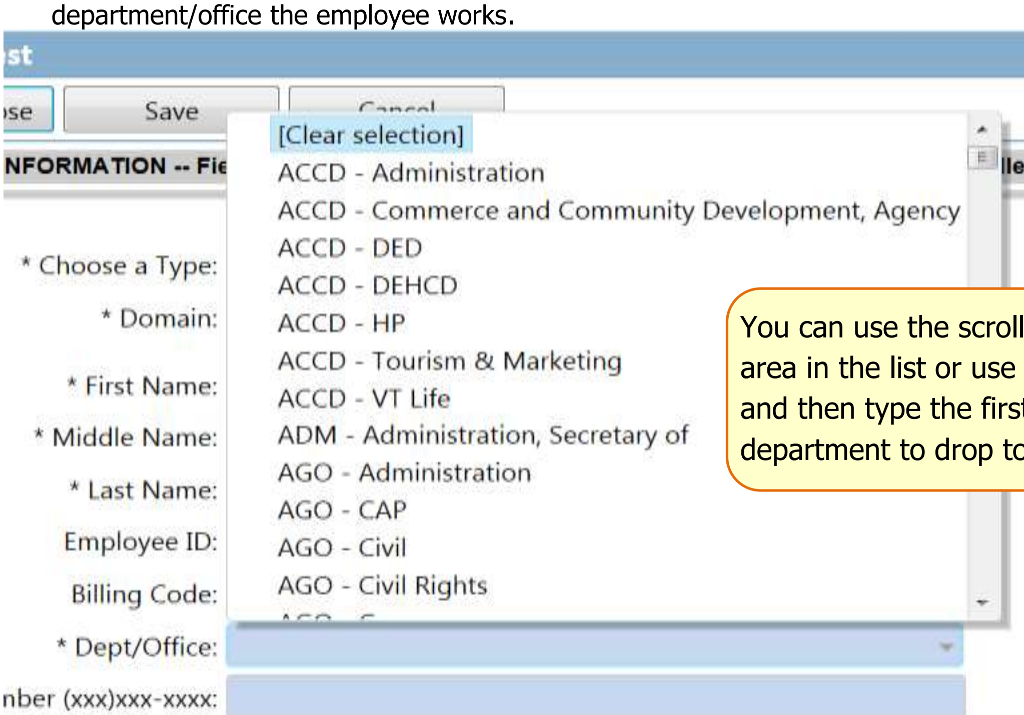
Choosing a Domain

In the Domain field, you must expand the selection (the drop down arrow) to indicate which domain this request will pertain to. This will also determine what accounts are available to request for the user.



Choosing a Dept/Office

In the Dept/Office field, you must expand the selection (the drop down arrow) to indicate which department/office the employee works.



You can use the scroll bar to bring you down to the area in the list or use the keyboard down arrow and then type the first letter of the employees department to drop to that area in the list.

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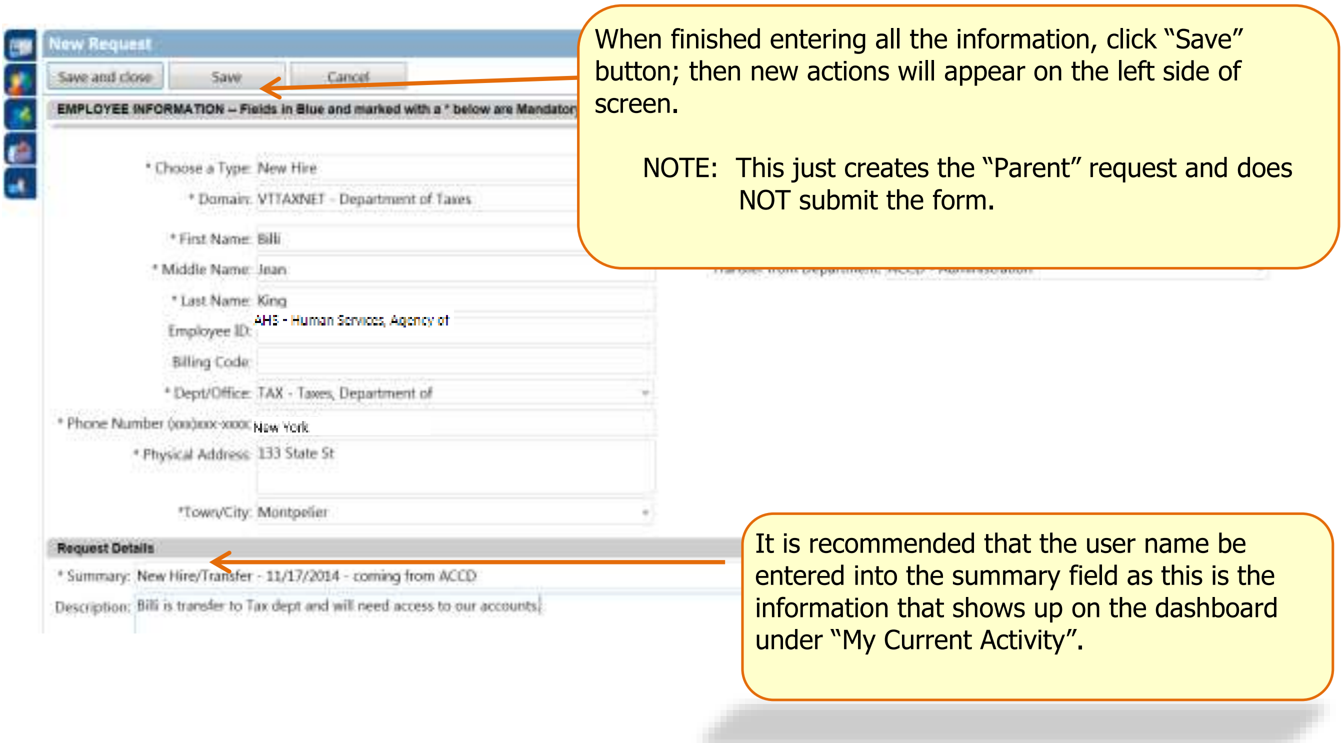
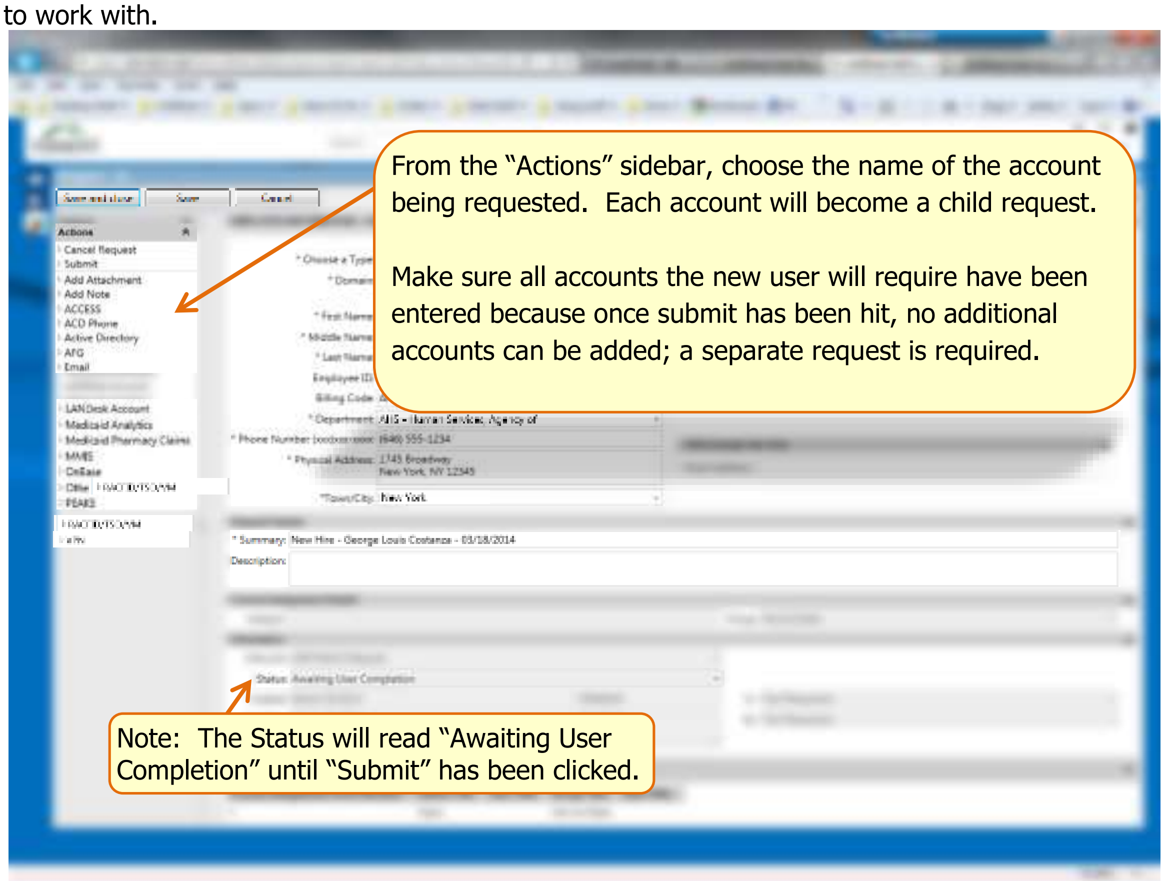
“Save” Employee Information



Creating an Account Request (Child)

Now you must choose the account actions pertinent to the employee request in order to create “child” tickets for an analyst to work with.



Account Request Examples

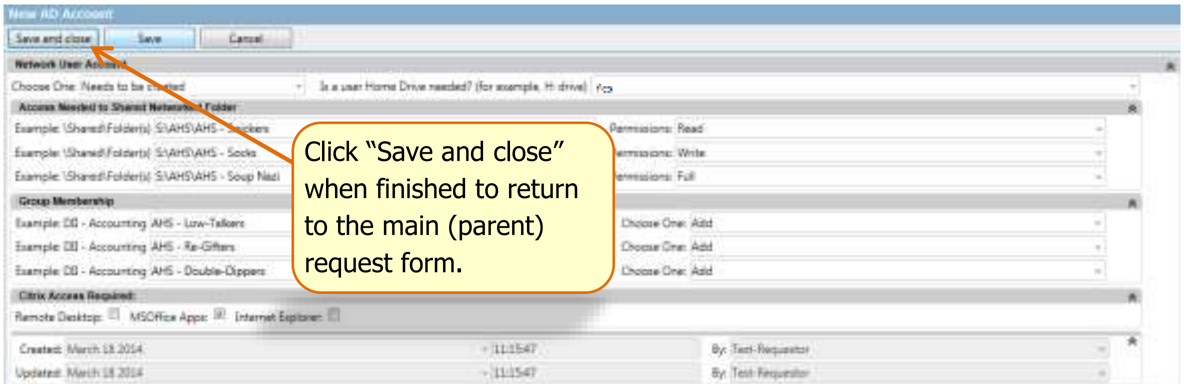
Active Directory Account Request

****FOR VSMS & AHS DOMAINS, this must be chosen when you have a New Hire and/or Termination****

Many of the AHS account actions are dependent on first creating the Active Directory account in order for those accounts to then be created.

It can also be chosen if an existing employee needs <u>changes to shared folders and/or security groups</u>.

The active directory is the "login" the user needs to logon to their computer. This must also be chosen any time you have a termination and make a note to remove all access in the folder or group fields.

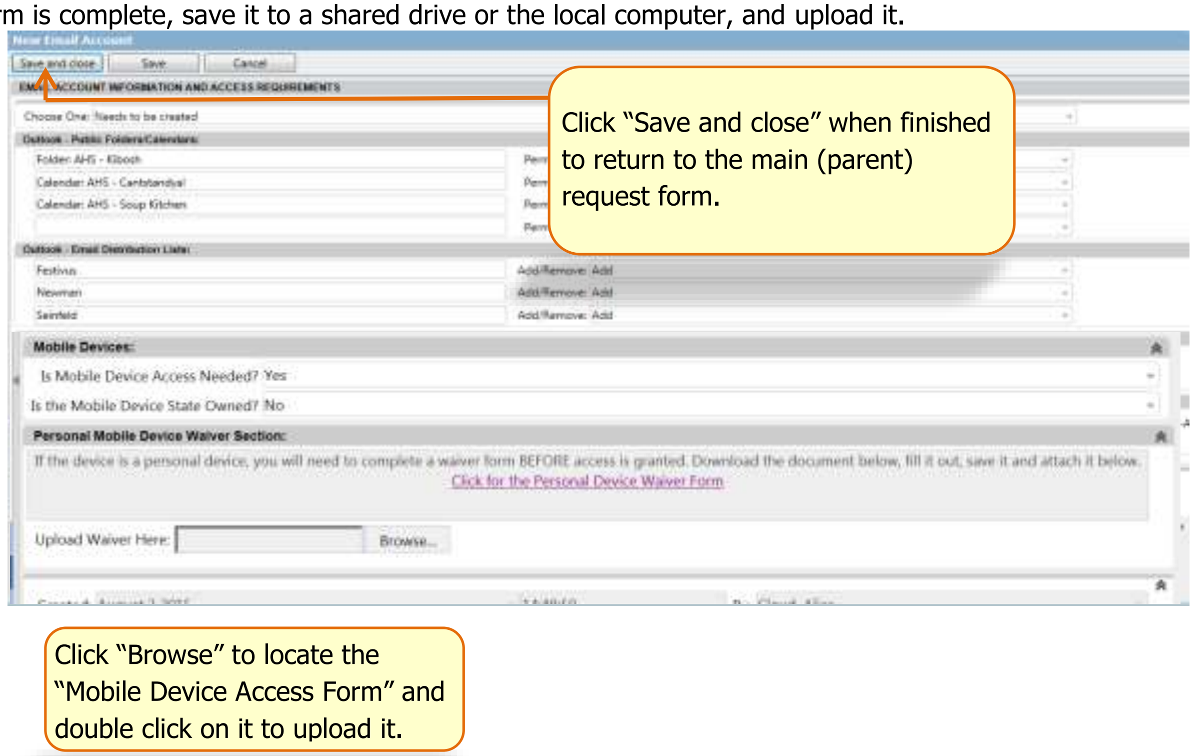


If you do not know the group names that are needed for the user, please write "unsure" in the folder or group field noted above and an analyst can call to assist.

Email Account Request

Indicate the names that are needed for the user in the folders and distribution lists fields.

NOTE: In the "Personal Mobile Device Waiver Section", if the new account will be using their personal mobile device, the "State of Vermont Personal Mobile Device Access Form" will need to be filled out and attached. The form can be obtained at http://dii.vermont.gov/sites/dii/files/Word_Files/Policies_Reports/Mobile-Device-Access-Form.doc. When the form is complete, save it to a shared drive or the local computer, and upload it.



Accounts needing prior approval

AHS only: There are a few AHS accounts that require approval before the account requests are sent to an analyst to create the account. They will be forwarded to the appropriate account approvers as part of the systems workflow behind the scenes.

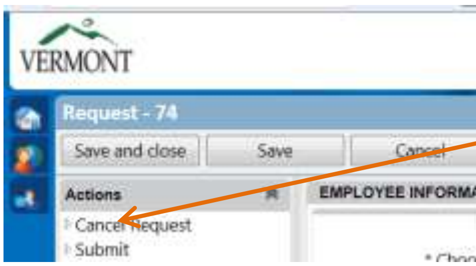
- ACCESS
- Medicaid Pharmacy Claims
- Medicaid Analytics
- MMIS
- OnBase
- VHC

These items need to first be approved by an account manager before the request can proceed to an analyst.

See Account Approvers Guide for more information about the approval process.

Cancel Request

If you determine that you no longer want to submit your request, you can click on Cancel Request at this time. This will basically "close" the account request before it is submitted – it will never go to an analyst.

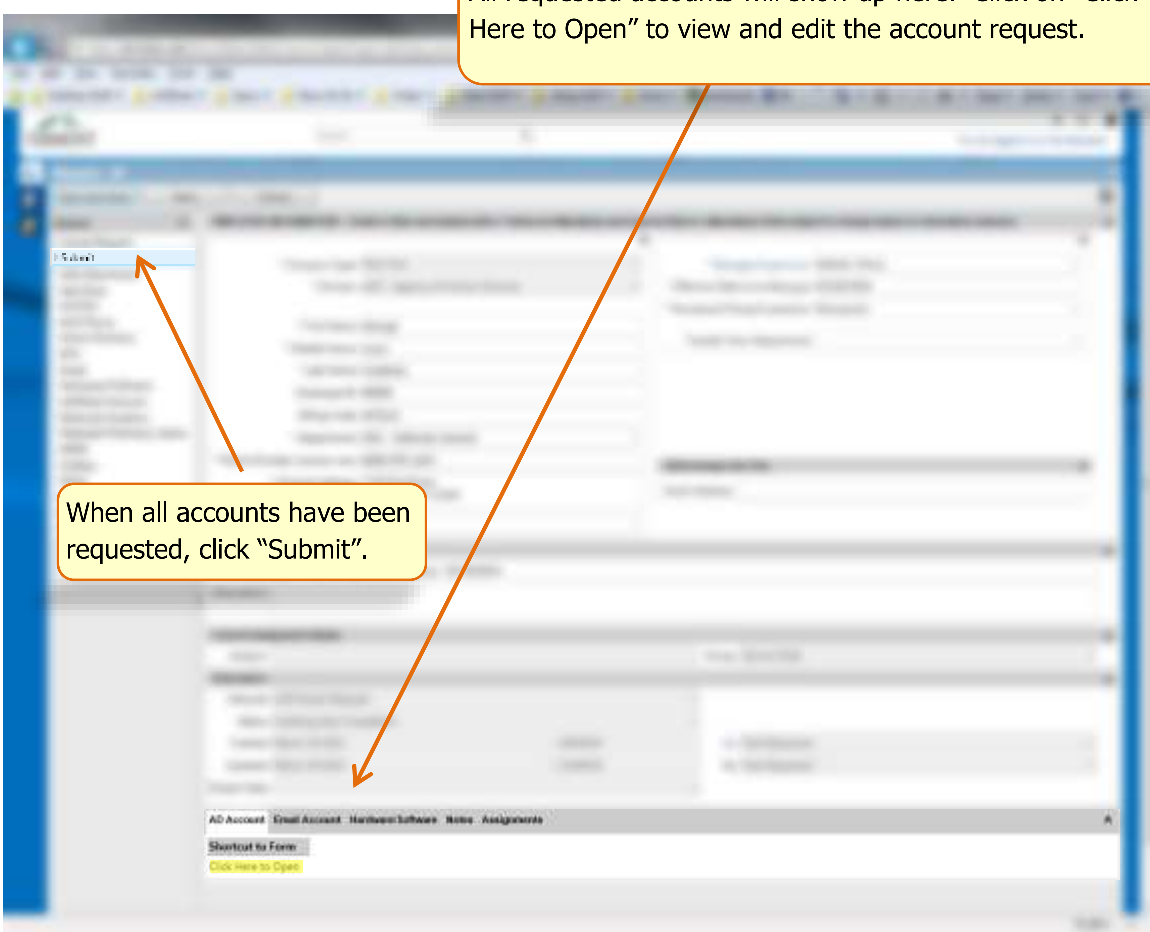


You can cancel the request before submission. Click on "Cancel Request".

Editing Account request forms prior to submitting

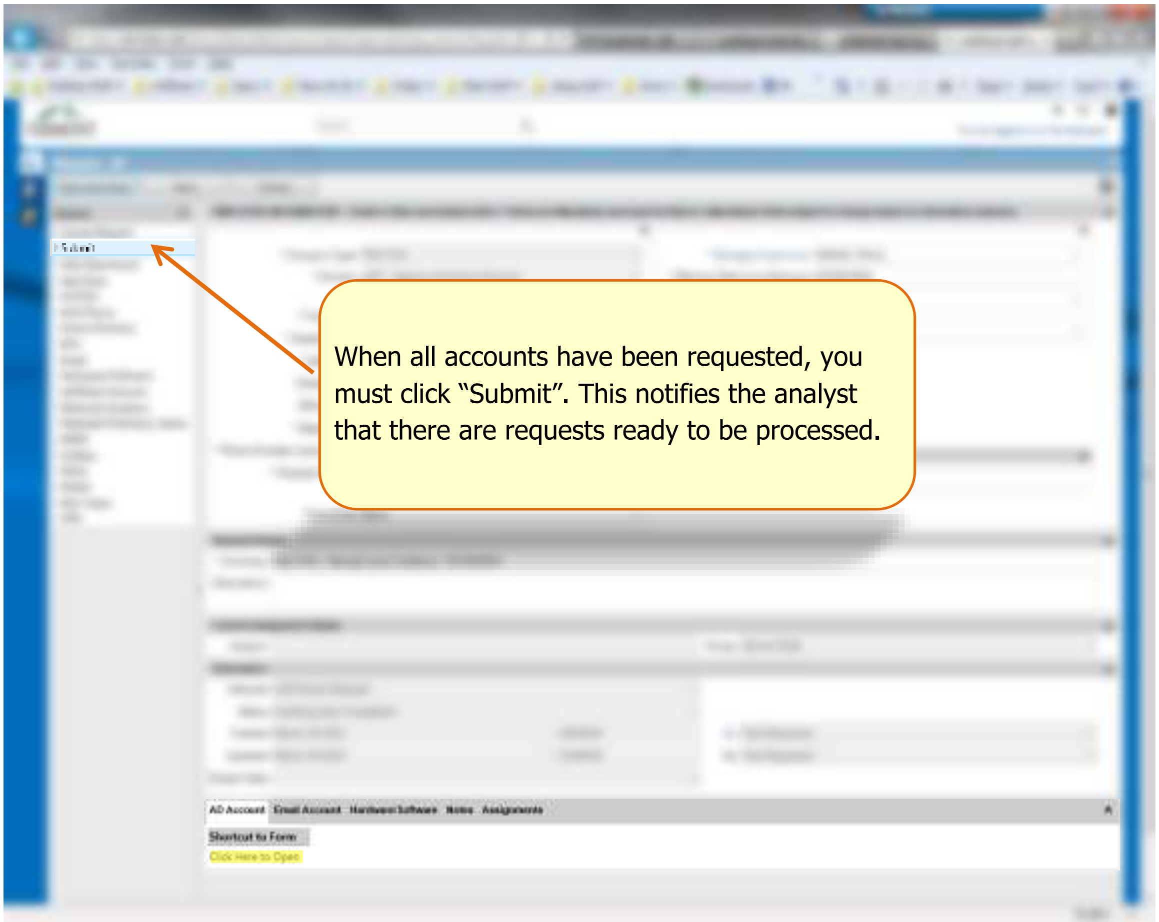
Editing can be done to an account form that has been saved **prior** to submitting the request. After submission, form changes are not available.

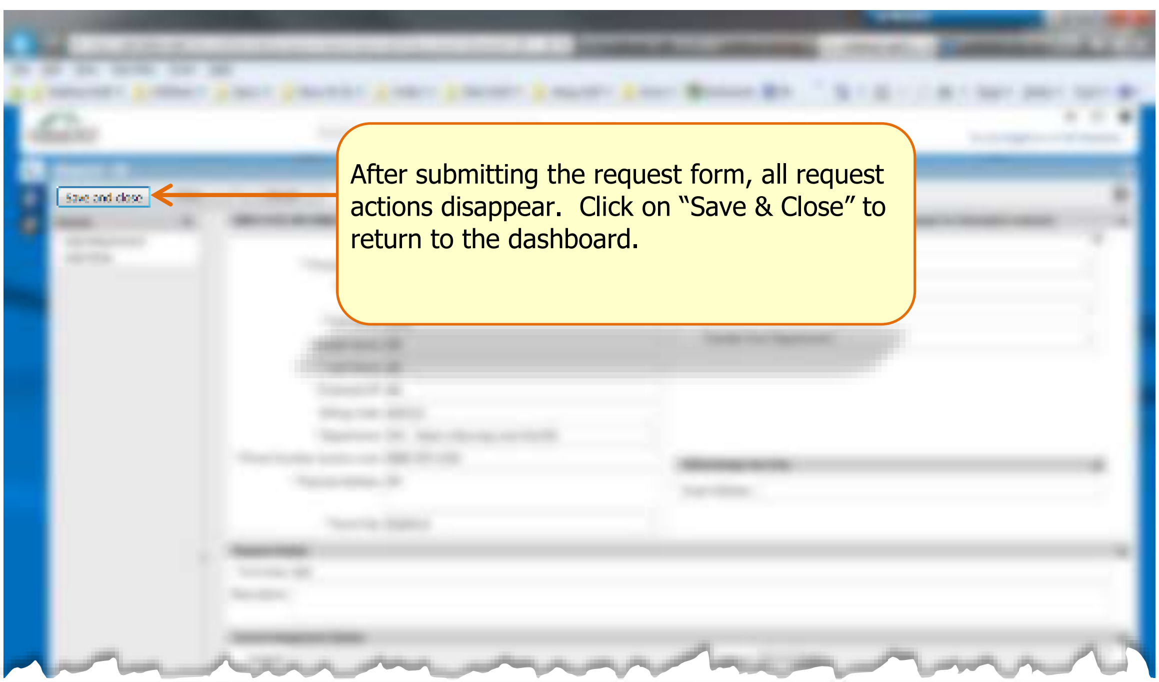
All requested accounts will show up here. Click on "Click Here to Open" to view and edit the account request.



When all accounts have been requested, click "Submit".

Submit


When all accounts have been requested, you must click "Submit". This notifies the analyst that there are requests ready to be processed.


After submitting the request form, all request actions disappear. Click on "Save & Close" to return to the dashboard.

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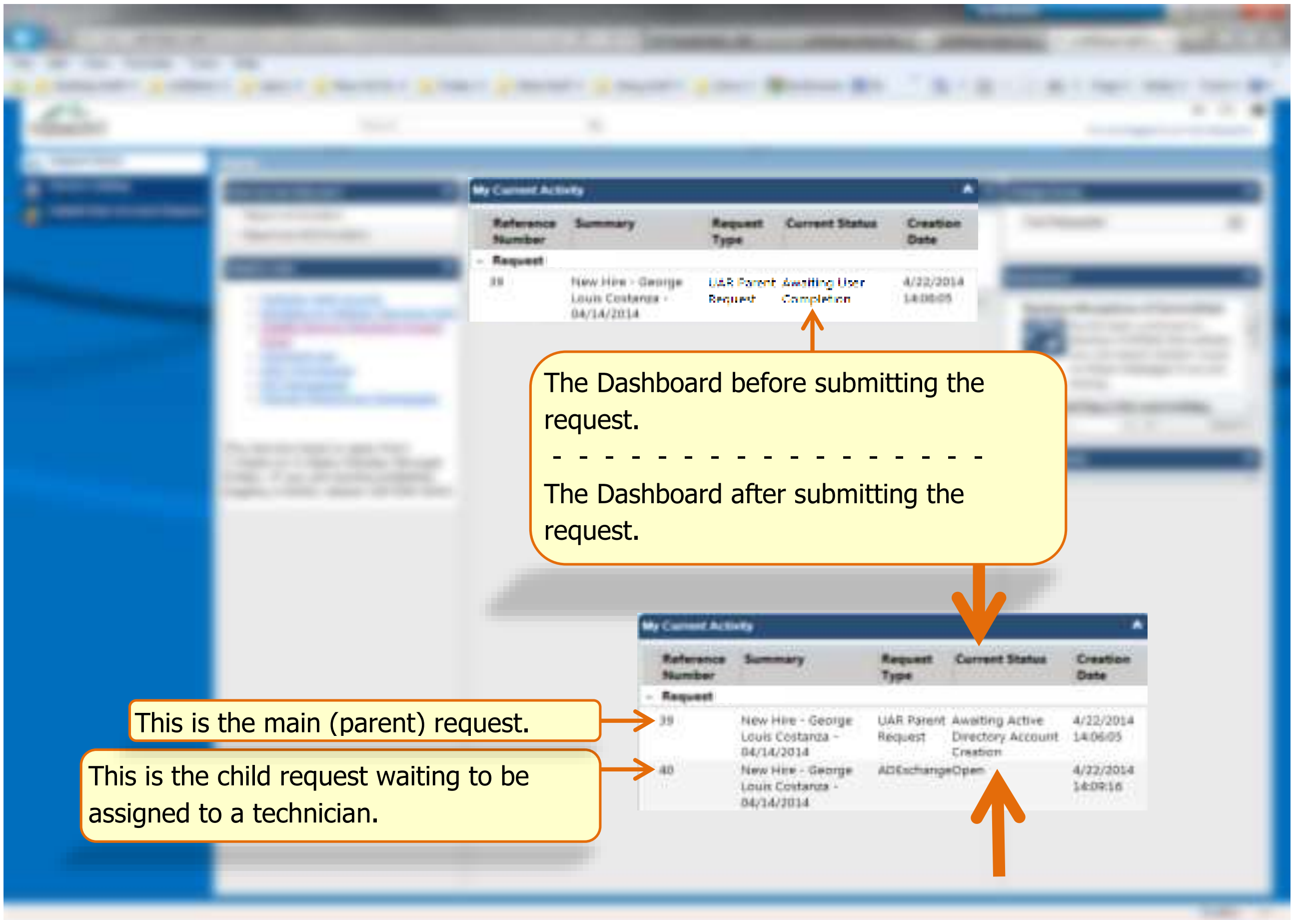


Directly after submission, the Parent request is now in "Awaiting Active Directory Account Creation" and the child request will have other statuses such as "Open" or "Awaiting Account Creation" or "Open for Manager Authorization".

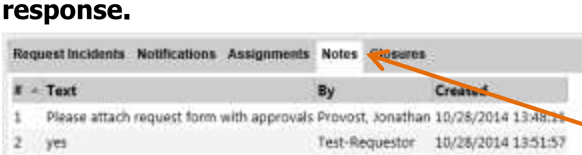
Actions after submission

Once the request has been assigned to an analyst, the requestor will receive an email referencing the request number. If you need to respond to an email, **<u>NEVER</u> change the subject line of a notification from LANDesk because that is how LANDesk identifies with the request. Any changes made to the subject line may result in a lost email response.**

Interaction with Ticket

Email

The requestor can reply to email at any time and it will be added to the "notes" section of the ticket. If you need to respond to an email, **<u>NEVER</u> change the subject line of a notification from LANDesk because that is how LANDesk identifies with the ticket. Any changes made to the subject line may result in a lost email response.**



All e-mail correspondence is stored in the "Notes" tab of the request form.
From the "Dashboard", click on the ticket and then the "Notes" tab at the <u>bottom</u> of the request form.

To open the note, just click on which note you want to see.

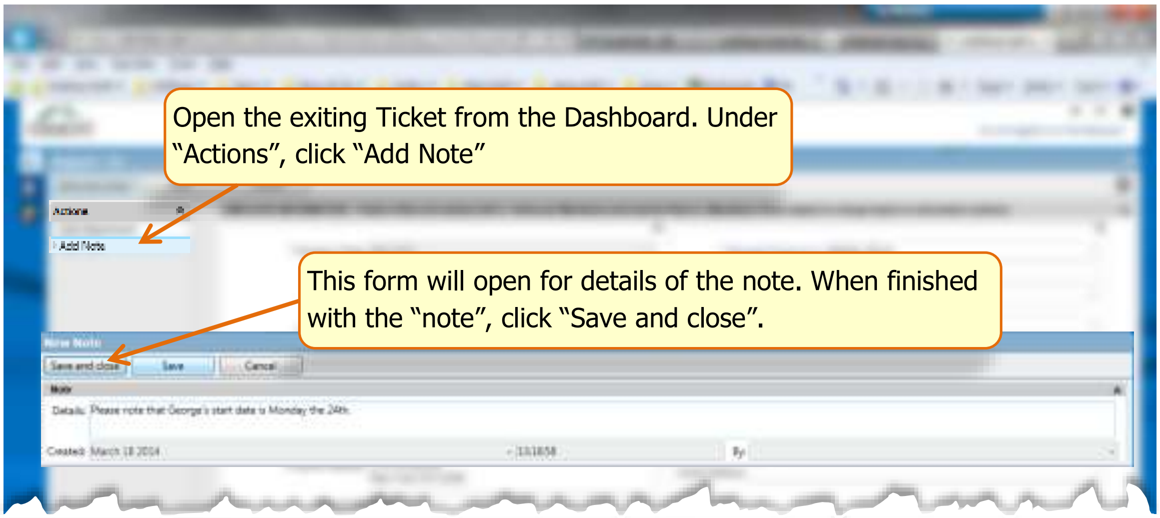
More Information Needed

Once the ticket has been submitted, an email asking for more information may be sent by the analyst. The email will contain the ticket number and what information is needed. This changes the ticket status in the dashboard to "With Customer" waiting for a response. **This means we are waiting for a response from the requestor (or the user having the issue) before we can complete the ticket.** When a response has been made, the ticket status changes back to "In Progress".

To reply, when more information is need, see "Email" section above and "Add Note" section below

Add Note

To interact within the ticket, only after it has been assigned to an analyst, – perhaps ask a question or answer an analyst's question -- the "Add Note" action appears and can be used. The note is added to the existing ticket and will email the support analyst handling the ticket. Go to the dashboard and click on the ticket to open it. "Add Note" is an action on the left side of the ticket.



Request Closure

As each account is created, the requestor will receive an email stating that the account has been created and that portion of the request (child request) has been closed. The email will contain the User Account Request (UAR) number and details of the account creation.

When all accounts have been created, the requestor will receive a final email stating all tasks have been completed and the request has been closed. The email will contain the main (parent) request number. Once a ticket has been closed, do not reply to the email as the ticket does not re-open and the analyst will not be informed of the issue. Contact the DII Service Desk to determine what steps are needed.

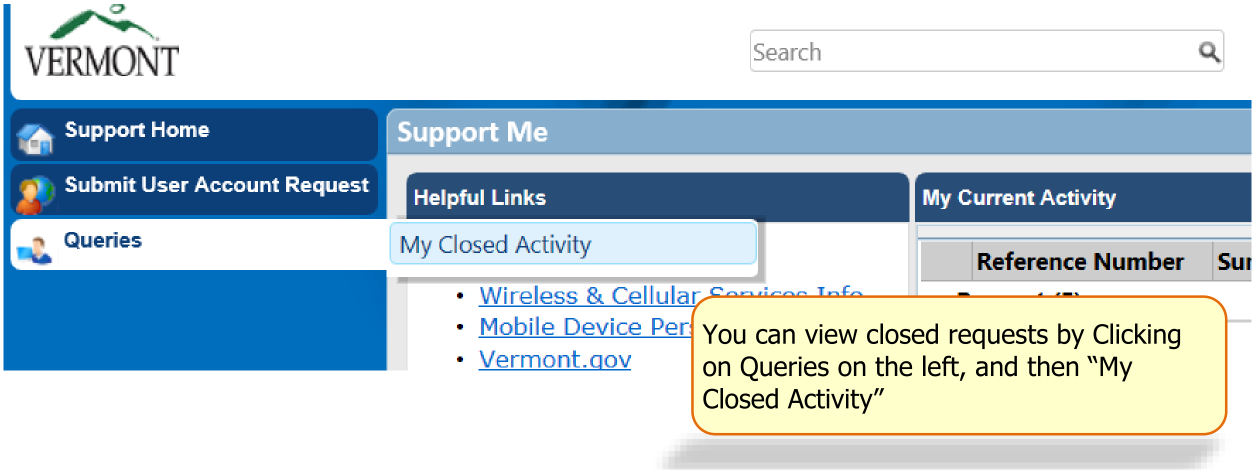
Once the request is closed, the "parent" and "child" requests will disappear from "My Current Activity" on the "Dashboard".

Closures Tab in user account requests: Closed requests have a Closures tab at the bottom of the page in which you can view details typed when ticket was closed.

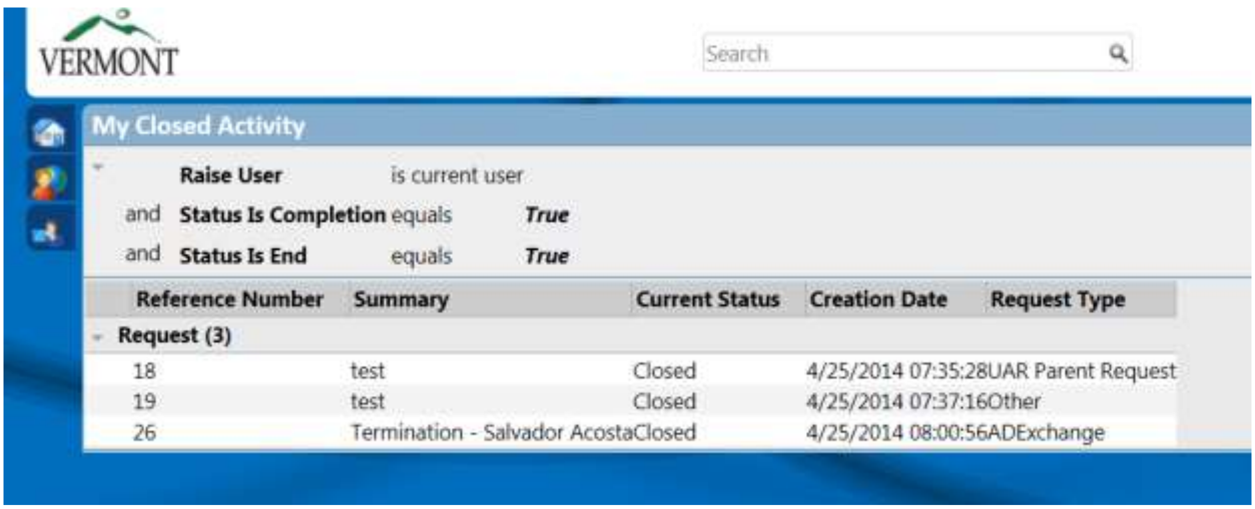
Reference Number	Description	Analyst	Analyst Group	Date Closed
[redacted]	The new user and email account has been created. Please contact the Help Desk at 802-828-6620 to activate the account and have them set the users' initial password. Thank you.	dan.rose	ADExchange	7/16/201 09:46:39

Request Closure Queries

You may view all closed requests on a separate Queries Dashboard.



List of Closed Requests:



Information – Questions/Report Issues

Questions

Contact DII Service Desk:

- Call 802-828-6620, option 1, or toll free 1-855-828-6620, option 1
- Training Documents: http://dii.vermont.gov/support/service_desk/landesk/training

Report Issues

1. Submit a "Request Support" LANDesk ticket that details the issue you are having if you are able. If you cannot submit a support ticket then send an email.
2. For LANDesk Change Information and Process, go to http://dii.vermont.gov/support/service_desk/landesk

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